



Departmental Quarterly Performance Report

Department Name: Property Appraisal

**Reporting Period:
2004-2005
2nd Quarter**

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MAJOR PERFORMANCE INITIATIVES

Describe Key Initiatives and Status

Check all that apply

<p><u>Conducting Real Estate Field Inspections</u> for 2005 assessment roll is one of the primary activities of this department in its efforts to accomplish the goal of submitting a certified assessment roll to the Florida Department of Revenue by July 1 of the roll year. For the 2005-06-assessment roll the division has 13,151 regular maintenance inspections and 19,127 new construction inspections. 2004-05 implemented field-tracking database.</p> <p>The Real Estate Division inspected 3,614 new buildings for the 2nd quarter. The Real Estate Division inspected 3,401 regular maintenance for the 2nd quarter.</p> <p>The Real Estate Division inspected 7,868 new buildings for the 1st quarter. The Real Estate Division inspected 4,555 regular maintenance for the 1st quarter.</p> <p>Total inspections to date 19,438.</p>	<p><input checked="" type="checkbox"/> <i>Strategic Plan</i></p> <p><input checked="" type="checkbox"/> <i>Business Plan</i></p> <p><input checked="" type="checkbox"/> <i>Budgeted Priorities</i></p> <p><input checked="" type="checkbox"/> <i>Customer Service</i></p> <p><input type="checkbox"/> <i>Workforce Dev.</i></p> <p><input type="checkbox"/> <i>Audit Response</i></p> <p><input type="checkbox"/> <i>Other</i> _____ (Describe)</p>
<p>Processing the changes of ownership using the <u>Clerk of the Courts' Imaging system (COC).</u></p> <p>The Real Estate Deed Unit processed 33,511 documents for the 2nd quarter. The Real Estate Deed Unit processed 30,074 documents for the 1st quarter.</p> <p>Total documents processed to date 63,585.</p>	<p><input checked="" type="checkbox"/> <i>Strategic Plan</i></p> <p><input checked="" type="checkbox"/> <i>Business Plan</i></p> <p><input checked="" type="checkbox"/> <i>Budgeted Priorities</i></p> <p><input checked="" type="checkbox"/> <i>Customer Service</i></p> <p><input type="checkbox"/> <i>Workforce Dev.</i></p> <p><input type="checkbox"/> <i>Audit Response</i></p> <p><input type="checkbox"/> <i>Other</i> _____ (Describe)</p>
<p><u>The Personal Property Field Inspections,</u> which started on September 23, 2004, was completed as of February 17, with a total of 87,833 locations being inspected for the 2005 assessment roll year. The clerical processing of the field books started the week of October 31, 2004, and as of December 31, 2004, 51% of the field inspections were posted, as of February 18, 2005, 100% of the field inspections were posted. During this quarter, the Division received 1,131 written correction requests, 1,047 phone inquiries and 139 front counter visits resulting in 232 written corrections to the tax roll to be audited. The Division is currently dealing with 35 different companies actively in the Bankruptcy process. Many of these individual companies consist of multiple folios and represent multi-million dollar assessments on the respective year's tax roll. Staff-hours needed to respond, prepare and investigate the various issues brought about in Bankruptcy process continue to run at approximately 80 hours a month.</p>	<p><input checked="" type="checkbox"/> <i>Strategic Plan</i></p> <p><input checked="" type="checkbox"/> <i>Business Plan</i></p> <p><input checked="" type="checkbox"/> <i>Budgeted Priorities</i></p> <p><input checked="" type="checkbox"/> <i>Customer Service</i></p> <p><input type="checkbox"/> <i>Workforce Dev.</i></p> <p><input type="checkbox"/> <i>Audit Response</i></p> <p><input type="checkbox"/> <i>Other</i> _____ (Describe)</p>
<p>2005 exemption filing cycle commenced with <u>the Homestead Exemption division</u> mailing 41,964 Senior Renewal Receipts and 409,017 Homestead Exemption receipts. As of the second quarter, 46,273 homestead exemption applications, 32,153 senior citizen exemptions (renewals), and 3,547 senior citizen exemption (long forms) were received and presently being processed.</p>	<p><input checked="" type="checkbox"/> <i>Strategic Plan</i></p> <p><input checked="" type="checkbox"/> <i>Business Plan</i></p> <p><input checked="" type="checkbox"/> <i>Budgeted Priorities</i></p> <p><input checked="" type="checkbox"/> <i>Customer Service</i></p> <p><input type="checkbox"/> <i>Workforce Dev.</i></p> <p><input type="checkbox"/> <i>Audit Response</i></p> <p><input type="checkbox"/> <i>Other</i> _____ (Describe)</p>

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<p>The Department is in the first phase of implementing the <u>Computer Aided Mass Appraisal (CAMA)</u> system which will improve the organization's daily business transactions and database processes.</p> <p>As summarized by the Vendor, SOFTWARETECHNIQUES, Inc., in its Status Report for <u>February/March 2005</u>: This project moves forward on three major fronts; data conversion, system configuration and interface development. It has become increasingly evident that the significant challenge for the real property conversion is related to mapping the PA's data from their legacy system into a true CAMA system. The existing legacy system has very few edits and very few lookup tables. The system configuration component is dependent primarily on the planning for and creation of lookup tables. Interface development has moved from a planning and discovery phase to prototype and development.</p> <p>The training room is completed and in use with 11 workstations. Focus Group staff to evaluate CAMA functionality compared with the department's current processes is currently using it.</p>	<p><input checked="" type="checkbox"/> <i>Strategic Plan</i> <input checked="" type="checkbox"/> <i>Business Plan</i> <input checked="" type="checkbox"/> <i>Budgeted Priorities</i> <input type="checkbox"/> <i>Customer Service</i> <input type="checkbox"/> <i>Workforce Dev.</i> <input type="checkbox"/> <i>Audit Response</i> <input type="checkbox"/> <i>Other</i> _____ <i>(Describe)</i></p>
<p>In keeping with the Manager's mandate to County Departments concerning the <u>Answer Center 311 Initiative</u>, The Property Appraisal Department transferred two clerical positions to the 311 Center; one staff member was assigned during the tax collector's billing cycle (November 2004) to provide property appraisal support; The Department conducted four days of training with 311 center staff in advance of the courtesy exemption application mailings in December.</p> <p>The 311 staff handled the bulk of the phone calls generated by these events. From November 28, 2004 until February 20, 2005, they have handled 23,589 calls for this department.</p>	<p><input checked="" type="checkbox"/> <i>Strategic Plan</i> <input checked="" type="checkbox"/> <i>Business Plan</i> <input checked="" type="checkbox"/> <i>Budgeted Priorities</i> <input checked="" type="checkbox"/> <i>Customer Service</i> <input type="checkbox"/> <i>Workforce Dev.</i> <input type="checkbox"/> <i>Audit Response</i> <input type="checkbox"/> <i>Other</i> _____ <i>(Describe)</i></p>
<p><u>Homestead Investigation Unit</u> primary responsibility is the investigating of property exemptions erroneously applied, for the first quarter the unit has file liens for a value \$278,881. During the second quarter the unit filed liens for a value of \$84,200. The decrease in value is due to the investigation staff being used to help with the exemption filing cycle during which takes place during the second quarter of the fiscal year.</p>	<p><input checked="" type="checkbox"/> <i>Strategic Plan</i> <input checked="" type="checkbox"/> <i>Business Plan</i> <input checked="" type="checkbox"/> <i>Budgeted Priorities</i> <input type="checkbox"/> <i>Customer Service</i> <input type="checkbox"/> <i>Workforce Dev.</i> <input type="checkbox"/> <i>Audit Response</i> <input type="checkbox"/> <i>Other</i> _____ <i>(Describe)</i></p>
	<p><input type="checkbox"/> <i>Strategic Plan</i> <input type="checkbox"/> <i>Business Plan</i> <input type="checkbox"/> <i>Budgeted Priorities</i> <input type="checkbox"/> <i>Customer Service</i> <input type="checkbox"/> <i>Workforce Dev.</i> <input type="checkbox"/> <i>Audit Response</i> <input type="checkbox"/> <i>Other</i> _____ <i>(Describe)</i></p>

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PERSONNEL SUMMARY

A. Filled/Vacancy Report

NUMBER OF FULL-TIME POSITIONS*	Filled as of September 30 of Prior Year	Current Year Budget	Actual Number of Filled and Vacant positions at the end of each quarter							
			Quarter 1		Quarter 2		Quarter 3		Quarter 4	
			Filled	Vacant	Filled	Vacant	Filled	Vacant	Filled	Vacant
			244	17	246	13				
241	261									

* Public Safety Departments should report the sworn versus non-sworn personnel separately and Departments with significant part-time, temporary or seasonal help should report these separately.

Note: In the Current Year Budget, two clerical positions are budgeted for the 311 Answer Center, which accounts for 261 total positions with filled and vacant totaling 259.

Notes:

B. Key Vacancies

Department is in the hiring stages for a Network Manager 1.

C. Turnover Issues

None at this time

D. Skill/Hiring Issues

None at this time

E. Part-time, Temporary and Seasonal Personnel

(Including the number of temporaries long-term with the Department)

F. Other Issues

Administration is implementing a succession plan to prepare the smooth transition of Administrative responsibilities pending the upcoming retirement of top administrative personnel.

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FINANCIAL SUMMARY

(All Dollars in Thousands)

	PRIOR YEAR Actual	CURRENT FISCAL YEAR						
		Total Annual Budget	2nd Quarter		Year-to-date			
			Budget	Actual	Budget	Actual	\$ Variance	% of Annual Budget
Revenues								
General Fund	17748	18489	4622	4924	18489	9691	-302	52.5
Reimbursement	-1251							
Budget Adj								
♦								
Total	16497	18489	4622	4924	18489	9691	-302	52.5
Expense*								
Personnel	15276	16784	4196	4614	16784	9056	-418	54.0
Operating	1208	1705	426	310	1705	635	116	37.2
Capital	13							
Total	16497	18489	4622	4924	18489	9691	-302	52.5

* Expenditures may be reported by activity as contained in your budget or may be reported by category (personnel, operating and capital).

Note: The four percent overage in personnel cost is due to the use of overtime to process the deeds, exemption applications, and field data for the 2005 assessment roll.

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STATEMENT OF PROJECTION AND OUTLOOK


The Department projects to be within authorized budgeted expenditures and projects that available revenues will exceed expenses except as noted below:

Notes and Issues:

(Summarize any concern or exception which will prohibit the Department from being within authorized budgeted expenditures and available revenues)

DEPARTMENT DIRECTOR REVIEW

The Department Director has reviewed this report in its entirety and agrees with all information presented including the statement of projection and outlook.



Signature
Department Director

Date 4/21/05